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interesting stuff I touched, experienced; (My Heart Land with Love Songs Radio Bar, automatic investment

suggestion system )

2010年5月18日星期二

## 三星半導體戰略對臺灣之影響 - 分析與評論

Samsung stand at GSMA Barcelona 2008

Image via [Wikipedia](#)

### 三星將擴產 **DRAM** 股又斷腸

全球最大記憶體廠韓國三星 ( [Samsung](#) ) 今年大擴產動作，且最快可能明年下半年即開出DRAM及NAND新產能，對才初 三星將大擴產，最快明年下半年開出DRAM及NAND新產能，對初見復甦綠芽的同業再度帶來一大競爭壓力。

本報系資料照見景氣復甦綠芽的DRAM廠再度帶來一大競爭壓力，且今早外電傳出，歐盟擬對三星、海力士、南科(2408)等10家記憶體廠商祭出罰款，引DRAM股今連第二天同步重跌。力晶 (5346)、茂德(5387) 今連吃第2根跌停板，茂德率先跌破前波低點，而南科(2408)近午盤跌破5%，華亞科



(3474)跌破半根停板。

韓國三星 (Samsung) 集團靈魂人物李健熙今年3月重披戰袍以來便一路展開科技事業擴張動作，繼續貫徹其「第一主義」作風，日前李健熙親自參與記憶體12吋Line-16破土，並宣布將今年資本支出大幅調升至18兆韓元，且應用於包括晶圓代工、記憶體及面板擴廠，其中最高筆9兆韓元將應用於記憶體，由於爾必達陣營的力晶、茂德、瑞晶才剛欣喜今年下半年加入新產能競爭戰局，三星此時的大動作讓投資人對負債壓力較大的力晶、茂德信心低落，導致股價再觸跌停。除了三星積極擴廠動作引台DRAM股壓力之外，今早自外電傳出歐盟將在本月19日宣布對三星、英飛凌、海力士、美光、爾必達、NEC、日立、東芝、三菱電機及南科等10家記憶體廠商依歐盟「反托拉斯」法律開罰，開罰金額約3億歐元，雙利空壓力下，DRAM股同步回測前波低點。DRAM股后華亞科跌破20元整數關卡。

瑞信：三星擴產搶單，**2012**年對晶圓代工威脅大增

瑞士信貸證券台股研究部主管艾藍迪今天出具研究報告指出，韓國三星電子宣布資本支出將擴增至158億美元，其中投注於晶圓部分將讓三星於2011年的晶圓產能三倍成長，12吋晶圓的產能比重將從5%提升至10%，加以三星將鎖定大客戶擴產而非全面性，搶單意味濃厚，顯示三星對晶圓代工同業的威脅提高，較大的威脅將在2012年發酵，但仍維持台積電(2330)評等為表現超越大盤。

艾藍迪認為，三星晶圓產能將更上一層樓，預期資本支出17.5億美元將激勵產能三倍成長，以供應三星明年的晶圓事業成長，12吋晶圓產能比重可望從5%提高至10%，占半導體業總產能比重也將從4%提高至7%，而今年台積電在12吋晶圓產能占整個半導體業產能從54%降至53%，明年則維持在52%。艾藍迪分析，三星對晶圓代工業者的威脅提高，但較大威脅將至2012年才會發酵，三星計畫調高大客戶產能而不是多元化，這將對半導體產業供給競爭造成負面衝擊，但維持台積電評等為表現超越大盤，預期更多的影響是在明年以後才會顯現。

## 分析與評論

- 三星晶圓代工事業開始起來，三星將大力發展晶圓代工技術配合記憶體封裝整合拼死臺積電 (TSMC)，臺積電必須加速發展晶圓代工技術與加強客戶關係，臺積電 (TSMC) 在記憶體技術遠落後三星晶圓代工事業，臺積電必須大幅投資低耗電、高階製程與記憶體製程，否則，將有危機；
- 一旦，臺積電晶圓代工30%營收被三星搶走，臺灣整體高科技將全部敗陣，而臺灣賴以為生之設計產業也將敗陣，失業率將急速上升；
- 臺灣由KMT與DPP兩黨組成之政治結構，除了會抽稅外，以營業稅遠高於香港新加坡，已經是實至名歸之『浪費錢的政府』，大家需要養這麼沒效率政府而承受競爭力之包袱嗎？
- 韓國與其他國家 FTA 已經簽差不多，而臺灣連 ECFA 都沒有下來，各國進口關稅 我們至少輸 10%，TSMC 是臺灣本土廠商，要犧牲10%利潤與韓國競爭很難作，臺灣這一點就是要政治犧牲經濟；
- 臺灣政府需要思考新創公司投資優惠策略，讓大型公司可以大幅透過轉投資新創公司投資優惠，增加研發比較，趁歐美不景氣人才願意投入新創公司之機會壯大臺灣科技；
- 由三星與臺積電 (TSMC) 股價看出臺積電 (TSMC) 可能快輸了，如果臺積電高層與政府不注意，產業與金融整體戰略，臺灣勢必轉弱且被韓國打敗，短期一定要利用臺灣內部人民幣定存或貨幣基金業務讓流進臺灣之熱錢轉臺灣相關銀行之人民幣金融商品，壓低臺幣。長期靠科技研發與品牌通路戰略。

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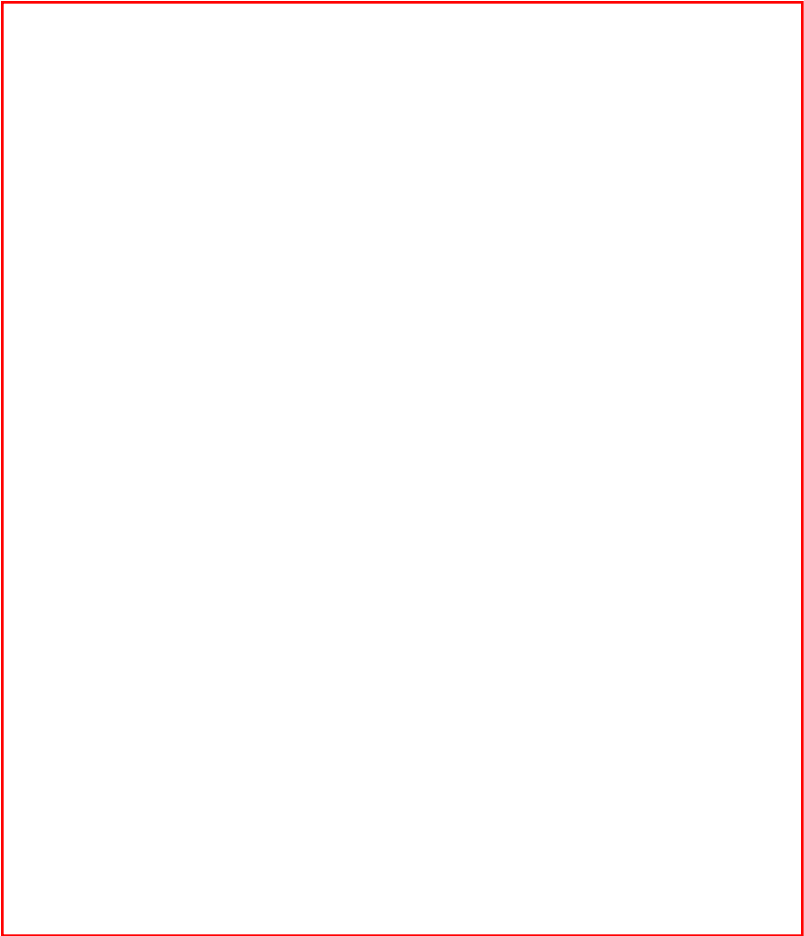


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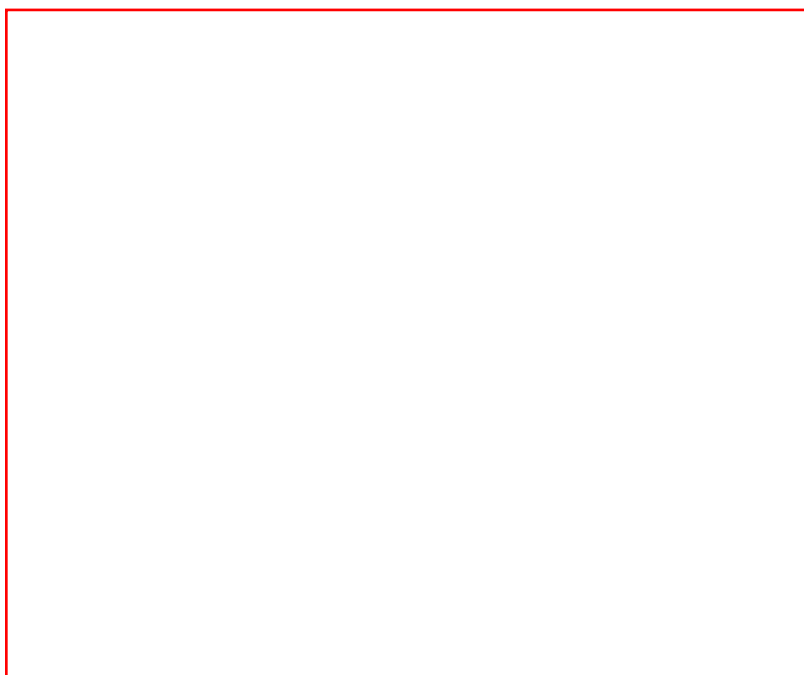


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## Nine Memory Makers Fined for Price Fixing

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by the oracle on 05/19/2010

3 Responses (Thoughts?)

The European Commission is levying some of the largest fines ever on hardware manufacturers. Nine of ten memory manufacturers were fined for their part in a price fixing scheme that affected the EU between **1998** and **2002**.

While it is nice to show that price fixing will not be tolerated, it remains to be seen how the EU will prevent the fines from being recouped with higher prices on memory now. This is one of those problems in economics that would seem to prevent any sort of fine scheme having any more than a palliative effect for those involved.

[[TechConnect](#)]

*The European Commission, the long arm of the EU, has today announced fines totaling 331,273,800 Euro or about \$407.19 million for memory manufacturers Samsung, Hynix, Infineon, NEC, Hitachi, Mitsubishi, Toshiba, Elpida and Nanya, for their participation in a DRAM price fixing cartel.*

*Micron is the tenth company found guilty of involvement but, because it was the one that came forward to expose the cartel, it was granted full immunity from fines.*

*According to the EC the firms mentioned have coordinated the price levels of DRAM memory sold to OEMs in European Economic Area since July 1st 1998 and June 15, 2002, this being in violation of the EU Treaty which bans practices restrictive of competition. How can there be competition if the players agree on the score*

*"This first settlement decision is another milestone in the Commission's anti-cartel enforcement. By acknowledging their participation in a cartel the*

*companies have allowed the Commission to bring this long-running investigation to a close and to free up resources to investigate other suspected cartels. As the procedure is applied to new cases it is expected to speed up investigations significantly, said Commission Vice President and Competition Commissioner Joaquín Almunia.*

*According to the data supplied by the Commission, Samsung received the largest fine – €145.7 million, followed by Infineon (€56.7 million) and Hynix (€51.4 million).*

Another problem is that of spreading the fines around. Since the fines are levied now, don't we all, *everyone who uses memory*, over the entire world, end up paying these fines?

§

Technorati Tags: [DRAM price fixing](#), [Samsung](#), [Hynix](#), [Infineon](#), [NEC](#), [Hitachi](#), [Mitsubishi](#), [Toshiba](#), [Elpida](#), [Nanya](#), [Micron spared from fines](#), [1998 to 2002](#), [EU](#), [European Commission](#) .

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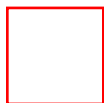


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**Nine Memory Makers Fined for Price Fixing « AccessTech News**

May 19th, 2010 at 11:07am



[...] <http://www.lockergnome.com/theoracle/2010/05/19/nine-memory-makers-fined-for-price-fixing/>  
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## Nine Memory Makers Fined for Price Fixing « The BAT Channel

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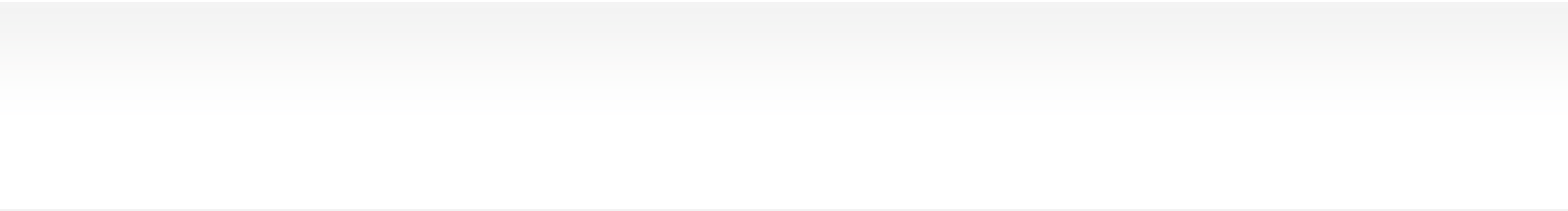
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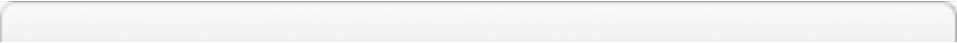
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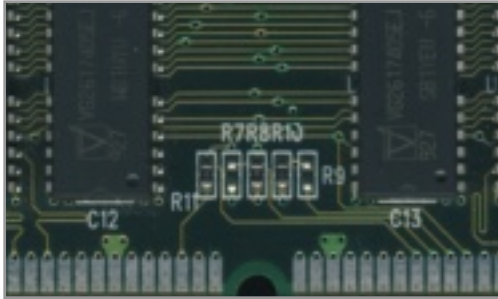


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Several of the biggest names in DRAM have been fined for colluding on prices

## European Commission comes down hard on DRAM cartel

Memory producers fined a total of €331m

**David Neal**

V3.co.uk, 19 May 2010

The European Commission has fined a selection of DRAM memory firms a total of €331m as part of an anti-trust settlement in a pricing cartel investigation.

The EC named Micron, Samsung, Hynix, Infineon, NEC, Hitachi, Mitsubishi, Toshiba, Elpida and Nanya in its summary. Only Micron escaped being fined, thanks to the help it gave investigators in revealing the existence of the cartel.

An EC statement said: "Cartel settlements allow the Commission to speed up investigations, free up resources to deal with other cases and generally improve the efficiency of its anti-trust enforcement."

EC competition commissioner Joaquín Almunia described the settlement decision as "another milestone in the Commission's anti-cartel enforcement".

"By acknowledging their participation in a cartel the companies have allowed the Commission to bring this long-running investigation to a close and to free up resources to investigate other suspected cartels," he said.

"As the procedure is applied to new cases it is expected to speed up investigations significantly."

The DRAM companies were given a 10 per cent reduction on their payments, along with other concessions, in return for their openness.

Samsung received the largest fine at €145m, while Infineon must pay €56.7m and Hynix €51.5m. Nanya got the lowest fine at €1.8m.

DRAM sales in the first quarter of 2010 reached \$9.5bn (£6.6bn), according to recent figures from Gartner, and Samsung is at the top of the earnings pile.



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When to deploy to mobile CRM and which application is best suited for your organisation.



## Best practices for mobile CRM

A carefully considered mobile CRM strategy can help your company lead in business productivity and employee and customer satisfaction.

### Poll

## Microsoft Office 2010 poll

**Microsoft's latest productivity suite launched on 12 May. Is your company going to upgrade?**

Yes, we already have upgrade plans in place

Probably, but we don't have a definite timescale

No, it's not worth the cost or upgrade work

No, we're already using an alternative like OpenOffice or Google Apps

Other - please comment below

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Software management firm targets new markets under direction of CEO...



### Microsoft slaps Salesforce with patent suit

Accusations cover nine Microsoft patents in CRM offerings



### BlackBerry Pearl 3G hands on video review

We take a look at the latest handset from RIM



### Microsoft Office 2010 poll

Microsoft's latest productivity suite launched on 12 May. Is your company going to upgrade?

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